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Robert Wenner

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**The Deep Roots of Vietnamese Tea:
Culture, Production and Prospects for Development**

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University of Denver

World Learning: SIT Study Abroad

Vietnam: Culture, Social Change and, Development

Fall 2011

Independent Study Project

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Abstract

Vietnam is at a critical stage in its development. If policy is properly managed the country's future is incredibly bright as the middle class grows and standards of living continue to rise throughout the country. Agriculture will play a key role in future development as nearly 70 percent of the population participates directly in agricultural work. Each crop that is produced and exported in Vietnam will play a different and integral part in development as the face of agriculture changes with Vietnam's increased global presence.

This research looks specifically at tea production in Vietnam through the lens of agricultural development. Tea is not only a strong export in Vietnam, but it has incredibly strong historical and cultural ties to the country as well. This paper delves deeply into tea to examine where culture and globalization meet, and what the future looks like for tea in Vietnam. Recent ascension into the World Trade Organization places Vietnam in a great position for increased international trade with new partners, holding great potential for growth in the tea industry. As the industry grows, though, what happens to traditional culture as international influence plays an increasing role in Vietnamese life? This study

seeks to answer this question as well as provide a holistic view of where the tea industry has come from and what the future may hold.

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Vietnam has been an incredible country to conduct research in. The warmth and hospitality that I received throughout my time here is something that I will never forget.

1.) Introduction

1.1 The Focus of the Research

Vietnam is at an incredible point in the country's economic development. Industries are flourishing as policies of market reorientation are starting to take fuller effect after Doi Moi was initiated in 1986. Standards of living are rising throughout the country and economic stabilization and advancement is finally occurring after the decades of war that dramatically stunted Vietnam's economic growth. The country's recent membership of the World Trade Organization will also provide Vietnam with great opportunities as long as leaders are able to adhere to the strict policy guidelines that the organization will require. The case

of Vietnam is largely unique when compared to other countries in the region, and the choices that the Vietnamese government makes in the coming years with regards to economic policy will be incredibly influential in the future successes and hardships of the country's economy.

From an academic or policy standpoint though, economic development in Vietnam is a beast of a topic. Covering fields from industry to agriculture, and a variety of very distinct periods of policy, textbooks can discuss economic development from a variety of perspectives and sometimes never do the field justice. Even a subset of the larger field, such as agricultural development can be daunting to try to tackle in a concise fashion. Given this and the time and resources at my disposal, I have decided to narrow the focus of my project and what exactly I am looking to explore and the conclusions that I will be able to make.

The prominence of agriculture in the Vietnamese economy, both from the standpoint of economic output, as well as the staggering proportion of the population that participates directly agricultural production, makes agriculture a prime field to study within the larger field of economic development.

Agriculture has in many ways become the backbone of Vietnamese economic development strategies as the country continues to push for higher yields to raise

the standard of living for the nearly 70% of the population that uses agriculture as its main source of income (Pham 1).

Within the field of agricultural development, I have decided to narrow my focus to study a single crop, tea. This decision was made not only as a result of having the time constraint of four weeks to conduct my research, but also because of tea's unique place in Vietnamese agricultural production, as well as its history and culture

Tea in Vietnam is not necessarily a key export for the country; though it does annually rank somewhere in Vietnam's top ten agricultural exports (Pham 3). Crops like rice and coffee remain at the forefront of Vietnam's agricultural output, and this is very unlikely to change. Tea, however, has considerable potential to increase dramatically in production in the coming decades as more land is dedicated to its production and increasing investment in tea science and technology bring higher yields and higher quality products. Further than economic potential though, tea has a very important place in Vietnamese culture. Tea is consumed daily throughout the country, throughout generations, and has been for centuries. The Vietnamese are proud of their tea, some of which is the oldest in the world, and their unique culture that surrounds it. As production continues to increase though, and policies are implemented and business drives Vietnamese into the world market, what will happen to authentic and traditional

Vietnamese tea? It is clear that tea can play a positive role in agricultural development, and as the value of Vietnamese tea increases, tea has a great potential to raise the standards of living for the roughly 400,000 people that participate directly in production (Nguyen, Huu Phong). With all of this potential, what does this path for growth look like, is it sustainable, and what will happen to true Vietnamese tea in the process?

Extensive studies have been conducted around various aspects of tea production, such as varietal improvements and ideal growing conditions, but this report looks to provide a more rounded study of tea in Vietnam, looking at the past, present and future of production and culture.

1.2 Methodology

The research in this report consists fundamentally of an analysis of secondary sources as well as extensive primary field research. Research for this study began at the First International Festival of Tea in Thai Nguyen province, where I was able to attend a number of presentations by various figures both the international and Vietnamese tea communities as well as see tea production and culture firsthand. This not only provided me with a great deal of information on various aspects of tea production, culture, and development, but helped me to

make several connections that proved to be incredibly beneficial further along in my research.

Upon my return to Hanoi from the conference I began to review my notes as well as the extensive literature on tea that I was able to accumulate. This helped form the basis of my research by giving me an idea of the general trends in tea production and the surface of tea's history in Vietnam. Access to the World Bank Library in Hanoi also provided me with great resources on the broader picture of agricultural development in Vietnam both pre- and post-Doi Moi. These resources consisted mainly of reports by, and presentations given by both Vietnamese and international experts in agriculture and provided me with a much clearer picture of Vietnamese development.

With this foundation I was able to better shape the direction that I would need to take my research and the topics that seemed most pressing within Vietnamese tea. From this point my research was directed primarily through interviews with experts on various aspects of tea in Vietnam. I was able to get a rounded perspective of tea from a historical, cultural, trade and developmental perspective through my various conversations, as well as more first hand experience with tea culture and actual tea growing. The questions I asked my interviewees were specific to each expert's field of study surrounding tea. I was interested in both specific factual data concerning tea and its changing role in

Vietnamese development and culture. Additionally, I inquired about their opinions on the future of tea as they see it from their specific disciplines.

I also had the privilege of studying at the Northern Mountainous Agriculture and Forestry Science Institute (NOMAFSI) in Phu Tho province halfway through my research period, which provided me with an even better view of tea production in Vietnam. While there I was able to tour their tea production facilities, conduct interviews and seek out more secondary research to augment my study.

The research that I have been able to compile has provided a great overview of what, through my study, I have determined to be the most important aspects of tea in Vietnam. My research has avoided overly technical details of production and development, as that is not the intended purpose of this report. Instead, this study seeks to provide a clear picture of the Vietnamese tea from multiple perspectives, as well as look into what the future may hold for the industry and culture, and their development.

1.3 Limitations

Though I am very confident that my study meets its intended goal of providing a clear picture of the current state of tea in Vietnam, it was met with a variety of limitations. One of the biggest limitations I encountered was time. My

study was limited to four weeks, which put a very large constraint on what I was able to see and whom I was able to talk to. I would very much have liked to talk to those involved more directly in the tea grown in the Central Highlands, but given my time restraints, I limited my research to the North. Additionally, given my lack of Vietnamese language abilities I was forced to rely on an interpreter for several of my interviews, which likely limited their depth to some extent.

Also, though I was able to come across a variety of literature on the topic, there is a plethora of further research reports that I would have likely benefitted from but unfortunately they were in Vietnamese. If time had allowed I would have loved to study tea for much, much longer, but given my limitations I am very confident in my final product.

2.) Discussion

2.1 A Brief History of Tea in Vietnam

At the risk of starting this study with a pun, tea has incredibly deep roots in both Vietnam's history as well as Vietnamese culture. From a purely scientific standpoint, Vietnam possesses some of the oldest living tea plants in the world. In the northern province of Ha Giang, along the Sino-Vietnamese border, Vietnam is home to tea trees that in some areas are over one thousand years old, making them the oldest in the world (Ngoc 365). This feat of dendrochronology

is only amongst the ancient tea that has been discovered up to this point but is a great feat nonetheless. This data begins to demonstrate at least to some extent how long tea has been a part of Vietnam, and in fact tea has been domesticated and consumed for much, much longer. It is common to think of China or India as the global cradles of tea, and from a gross output standpoint this is valid, but Vietnam also maintains a long history of tea consumption and culture that is much its own.

Tea consumption has been a part of Vietnamese culture for centuries. Beginning early on in Vietnamese history, far before the periods of Chinese domination, tea was consumed widely by the peasant population in its purest and most simple form. Fresh tealeaves were taken from trees in the forest or personal gardens and macerated, then boiled and enjoyed, most often as a part of social engagements. In many cases the tealeaves were also ground and fermented to produce liquor that was consumed widely throughout northern mountainous regions (*"The Vietnam..."* 8). This culture of fresh tea will be discussed in better depth later on, but it is important to note that at this point in Vietnamese history, tea was being harvested solely for consumption on a personal basis, not for sale or export.

Large-scale tea production did not begin in Vietnam until the French arrived and began taking interest in Vietnamese agriculture for colonial

purposes. The French began purchasing small amounts of Vietnamese tea and surveying suitable areas for tea production throughout the 19th century, and eventually established Vietnam's first tea plantation in 1890 (Nguyen, Huu Phong). This plantation was started in Phu Tho province, still a major center of tea production today, and consisted of only about 60 ha (Ngoc 385). The French continued production into the following decades of colonization, noting the quality of Vietnamese tea and showing interest in expanding their production to other areas of the country ("*The Vietnam...*" 8). In 1918 the French helped to establish the Phu Tho Agriculture and Forestry Research Center in the province of the same name, which sought to further investigate effective growing conditions and methods, but more importantly showed increased international interest in Vietnamese tea (Nguyen, Huu Phong).

From this point in history, Vietnamese tea production began to grow very rapidly. The French established more plantations, with notable centers in the North and South, and began exporting green tea, black tea and special Vietnamese varieties of tea to France, other countries in Western Europe, Hong Kong, Singapore and China ("*The Vietnam...*" 10). By 1945 tea plants covered roughly 13,585 hectares throughout the country with a total production of 6,000 tons of dried tea annually (Nguyen, Huu Phong).

After 1945, Vietnamese tea saw a dramatic decrease in investment and production as violence began to increase first with France and later the United States (Nguyen, Huu Phong). There was a limited amount of regional small-scale investment in the form of money and technology from China and Russia between the years of 1945 and 1975, but overall input was low at best as Vietnam was not equipped to grow industry during wartime (*"The Vietnam..."* 11). Additionally, domestic demand for tea remained low during this period. Tea is largely a luxury beverage, and food and income insecurities during wartime prevented large portions of the Vietnamese population from purchasing tea during wartime (Nguyen, Huu Phong).

Following Vietnam's liberalization in 1975 and through the early 1990s the tea industry began to flourish. Socialism helped to create strong ties with the Soviet Union after 1975, which ensured a reliable market for the export of black tea. In addition to providing a market for Vietnamese tea, the USSR also provided funding for the improvement of many tea-processing facilities, most notable in Lam Dong province where a large portion of Vietnamese black tea production takes place (Nguyen, Huu Phong). This strong, consistent demand for export along with an increased interest in tea production on a broader scale, for domestic consumption as well, by the Vietnamese government helped the tea industry to prosper for a period of roughly sixteen years.

In 1991 the collapse of the Soviet Union dealt a swift blow to the Vietnamese tea industry as a major market for exports and source of investment suddenly disappeared. This major change forced Vietnam to shift tea production from essentially a production flow to market centered production and export. This change came relatively soon after the market oriented reforms of Doi Moi, but at the time the tea industry was still not very well equipped to deal with such a structural change to its export sector. With this, tea production slowed for several years as new investment lagged, but by the late 1990's tea production began to pick back up as integration into the world market began to finally take hold. Many new joint venture companies were established between Vietnam and countries such as China, India and Iraq that helped to boost production and investment and spurring rapid growth into the new millennium (Nguyen, Huu Phong).

Currently there are 34 provinces in Vietnam that are growing tea with a total area of roughly 130,000 hectares devoted to production. This is a tenfold increase from the 1939 total growing area of 1939. Tea production has also seen a marked increase in yield over the past several decades with current levels hovering around 7.15 tons per hectare of wet tea per year. All of this is a great improvement from previous times, with investment levels increasing rapidly (*"The Vietnam..."* 12).

The current state of Vietnamese tea production will be covered in more depth in pages to follow but while analyzing where Vietnam is currently with regards to production levels and investment, it is also very important to look at where the country has come from. Vietnam has had a very long history with tea, given the fact that tea is native to Vietnam, and many areas of the country are incredibly well suited for production as many new investors are beginning to realize. In terms of world market integration, Vietnam is relatively new compared to its major competitors. The country was only truly forced into the world market relatively recently with the collapse of the Soviet Union and the loss of a major production flow importer. As Vietnam has gained more of a presence globally, many countries are beginning to see the potential that Vietnam holds for production and take interest in investment. This puts the current state of Vietnamese tea in a unique position with incredible potential for growth and increased competitiveness with other major producers (Nguyen, Huu Phong).

2.2 Tea Culture in Vietnam

Vietnam's unique history and storied past with tea has brought with it an incredibly unique and rich culture surrounding tea. Tea consumption has dated remarkably far back in Vietnamese history, and through time it has developed

into several different forms that are all unique and in many ways unique to Vietnam.

2.2.1 *Che Tuoi* – Fresh Tea

Tea culture first, and most importantly, comes from the rural peasantry (Le). Long before Chinese occupation, the rural poor harvested tea from local forests or personal plants, which were tended in their gardens, and served it to their friends and family. This tea was plucked fresh from the trees or plants, boiled quickly in an earthenware vessel and served in a simple, common bowl to friends and family (Hoang). This method of drinking tea is very unique to Vietnam and is treasured by many in the tea community, as it is a great reflection of the peasant lifestyle that has been an integral part of Vietnamese culture for centuries upon centuries.

The tradition of drinking ‘fresh tea’ also helps promote the idea of community and taking time to sit and talk to others. A prime example of this culture can be seen in traditional Vietnamese music. Quan Ho music, a traditional Vietnamese style, features a variety of songs that contain reference to ‘fresh tea’ and the communal nature of tea consumption in Vietnam (Hoang). This music and other facets of Vietnamese culture helped to spread the unwritten

law that is now present through many generations of Vietnamese society, to offer guests tea and have them drink.

Traditional fresh tea consumption in Vietnam centered on being with others and sharing time and conversation, more than simply drinking tea. Drinking tea provided friends and neighbors with a break from their agrarian lives to sit and converse about recent happenings or the latest harvest, in many ways a release from the hardships that are inherent in the life of a rural peasant (Le). With this, tea drinking came to represent much more for the rural populations than simply a beverage, but an opportunity to relax and enjoy the company of others.

Fresh tea consumption in Vietnam has largely set the foundation for the current tea culture that exists today, as tea continues to exist largely as a social beverage that is prepared simply and shared with friends (Hoang).

2.2.2 *Tra Dao* – The Religion of Tea

As Chinese influence slowly began to penetrate Vietnam, another layer of tea culture started to form within the country's higher ranks. The traditional Chinese hierarchical structure, with scholars and noblemen held very separate from the lower classes, brought with it a tea culture that was reserved

for the wealthy. The ceremonial method of tea being served in a very ornate and methodical manner came with Chinese influence and spread through the higher ranks of Vietnamese society in Hanoi (Le).

Tea consumption in a ceremonial setting is a very formal engagement with very specific roles of drinker and preparer, further stratifying the rich from the poor as consumption was, and in some cases still is, reserved for the wealthy (Hoang). This provides a very clear contrast from 'fresh tea' culture with tea becoming less of an informal gathering and more of a ceremonial show of power and wealth. The influence of the Chinese also brought with it the use of the teapot. This led to a major change in tea consumption, away from traditional preparation vessels and to Chinese teapots which are still used everywhere today (Hoang).

For some, this *tra dao*, or 'religion of tea,' is also seen as a very meticulous art form, with very particular steps for each part of the tea preparation. The ceremony is broken down into many parts, such as cleaning or preparing the tea, all with the goal of producing the perfect cup of tea (Le). Again, this further demonstrates the differences between 'fresh tea' and tea ceremonies and the influence of China in Vietnamese culture. Though 'fresh tea' culture is a very uniquely Vietnamese phenomenon and important in tea culture, it is also important to take into account '*tra dao*' when considering tea in Vietnam (Le).

2.2.3 The Current State of Vietnamese Tea Culture

Tea culture in Vietnam currently exists largely as a combination of the two aforementioned forms mixed into a modern and developing society. 'Fresh tea' consumption, and more importantly the idea of tea drinking as an informal social function, remains very prevalent in Vietnamese society. Though the practice exists slightly less in major cities as Western-centric development occurs at breakneck speed, citizens throughout the country gather constantly for a quick cup of tea and a brief chat with friends. Friends will stop by the neighbors' houses in passing and are immediately offered tea as an invitation to sit and talk daily, if not multiple times daily for many people, especially in the countryside. With this, tea continues to represent a very communal and social aspect of Vietnamese culture. The offering of tea even today comes with the vital, implied invitation for more than just a drink, but a chance to relax and enjoy the company of others (*"The Vietnam..."* 89).

Though tea ceremonies are currently not present in Vietnamese tea culture outside of very special cultural engagements or demonstrations, the formal aspects of tea preparation and consumption can still be seen from time to time throughout the country. The formality of tea drinking is largely based upon the nature of the engagement. If tea is consumed after a formal dinner, it is more

likely to contain some formal elements in its preparation and drinking that more often than not draw influence from Chinese tea ceremonies (Hoang). It is very important to note that this type of formality is not common in Vietnamese tea drinking, and is becoming less and less frequent as Vietnamese culture in cities modernizes (*"The Vietnam..."* 93).

Modernization has had a strong effect in diluting traditional Vietnamese tea consumption, especially in the past decade. As the pace of Vietnamese life in cities picks up, there has been a noted increase in the consumption of bagged and bottled tea made by large multi-national conglomerates such as Lipton or Dilmah. The single serving nature of these products has directed tea drinking away from the social component that used to drive consumption and instead to the individual. This trend has effected primarily the younger, working generation as they slowly integrate more aspects of Western lifestyles into their daily lives. A large contingent of Vietnamese society still consumes tea in the traditional social manner, particularly in the countryside. Especially in Hanoi, it is a common occurrence for older generations, more often than not migrants from outlying areas, to be found sitting with others and sharing small cups of tea at sidewalk vendors (Le). This then raises the question of what the future could hold for traditional tea culture, as older generations begin to pass on and the single serving generation ages.

Influential tea culture preservationist and Hanoi teashop owner Hoang Anh Suong, sees incredible importance in preserving Vietnamese tea traditions. He notes the increasing trend of single serving tea consumption, but has also seen a resurgence of interest in traditional high quality teas in more recent years from younger generations. His teashop features traditional sitting areas for customers to gather around a pot of high quality traditional green tea to be enjoyed with others, offering a break for many young professionals from their busy lives. With this, they are appreciating traditional tea values without even necessarily knowing it. Suong believes that tea represents something beyond itself in Vietnamese culture with its important social tie and sees opportunity to foster this sentiment among younger generations (Hoang). He continues to promote traditional 'fresh tea' culture and hopes that others will join him.

Power in numbers will be incredibly important if traditional culture is to be preserved in the face of modernization, especially in cities. Many like Vietnamese historian Le Van Lan see marketing opportunities for future generations. As incomes increase there is more potential for tea consumption as a luxury beverage, and with proven health benefits, there is considerable opportunity for business. Though there is potential, current ventures into this marketing strategy are very limited as of now.

Vietnam stands at an interesting crossroads with regards to tea culture. As the country develops and seemingly unavoidable modernization occurs, it is not clear what will happen to traditional culture. There are pockets of the population that still cling to age-old practices of tea drinking, but the question remains of how long they can hold on in the face of the consumer culture that is spreading from the cities. Tea culture represents an incredibly important part of Vietnamese culture by facilitating an important communal and social outlet, but if Vietnam continues in the current general direction, it is likely this culture will become something of the past.

2.2.3.1 North versus South

It is important to note that the North and the South of Vietnam maintain different tea preferences and drinking habits. The North has maintained very traditional drinking with widely held preferences for strong and bitter green tea, served in very small cups. Legends surround this type of tea in the North, particularly around its potency, and in some areas it is even thought to be strong enough to stand toothpick inside of the cup (Le). This preference is largely due to the fact that the vast majority of Vietnamese green

tea production, Vietnam's overwhelming preferred tea variety, is in the North and the habits of drinking strong tea in tea growing areas has spread to neighboring regions. The colder weather in the North also likely plays a role in people's preference for hot tea, as opposed to cold tea.

In the South of Vietnam there is an increased preference for iced tea, which is served more as a thirst quencher than a slowly consumed, social beverage as green tea is in the North. This preference is largely due to the warmer weather in the South, and could also be attributed to the lack of proximity to green tea producing regions (Le).

2.3 Vietnamese Tea Production – Post Doi Moi

As with the future of tea culture, Vietnam stands currently at a very important point in tea production. International companies are beginning to take more and more interest in Vietnam as a production center, creating incredible potential for growth. When considering this opportunity for development, however, it is very important to take into account the current state of tea production when looking at possibilities for the future.

Currently Vietnam produces tea in thirty-four provinces with a total growing area of 130,000 hectares. This is a sizeable portion of land with potential to increase much more over the next ten years. Currently, Vietnam's total

production is roughly 50 percent black tea, mainly for export, and 50 percent green tea and other varieties, with the green tea consumed primarily domestically.

2.3.1 Growing and Cultivating

The individual farmer still plays an incredibly important role in Vietnamese tea production. Unlike in many industries that are moving towards more plantation style vertical integration, individual farmers still overwhelmingly produce tea in Vietnam. It is then sold at market to middlemen or larger retailers, and then processed for sale. Thus, the farmer is able to maintain tremendous influence in the quality and variety of tea that is produced in Vietnam, as standardization and quality control can at times be difficult. There is a movement towards more of a plantation based production model, which will be discussed later, but first it is important to start with the farmer.

2.3.1.1 The Tea Farmer

Tea begins overwhelmingly in Vietnam with individual farmers, many of which who inherited the lifestyle from previous generations, in the several growing areas throughout the center and North of Vietnam. Though tea is a relatively versatile crop, ideal climates yield remarkably more and

Vietnam is fortunate to contain wide expanses of opportune land (*"The Vietnam..."* 19). Ideal tea growing conditions require cool air and an average humidity between 80-85%, and loose but nutrient rich soil (*"The Vietnam..."* 20). As this knowledge became widely know in Vietnam, many farmers began converting their arable land to tea production throughout the Northern provinces of Phu Tho and Thai Nguyen, as well as throughout Central Highland areas such as Lam Dong province (Nguyen, Huu Phong).

Tea farming is largely a family process requiring intensive work year round, as tea can be harvested multiple times annually. There are a variety of methods for sowing tea plants, including planting by seed, cutting or mulching, as well as new processes are being developed throughout the many tea research centers that exist in Vietnam (Nguyen, Huu Phong). The farmer and their family most often plant tea, occasionally with hired help that often comes from extended family members. Farmers most often receive information on proper planting techniques from research institutes and extension services like the Vietnamese Farmer's Union (Nhung). It is also important to note that tea plants are not replanted unless the farmer elects to grow a new variety. Thus, many farmers throughout the country are still harvesting from plants that are over twenty years old. This fact greatly reduces the yearly input costs that farmers have in comparison to other crops like rice that must be replanted, but creates an

issue of overuse of old low-yield varieties that will be discussed in more depth later (Nguyen, Huu Phong).

Once the plants have been sowed it can take several years of maintenance before real harvesting can occur (Nhung). The crops are maintained throughout the growing season with proper irrigation, application of fertilizers and pesticides, and pruning. Because of tea's relatively consistent yield, tea farmers are not traditionally pressed for funds with which to purchase fertilizer or pesticides, and thus are often able to support themselves without the help of loans from banks. Irrigation systems, though, are usually a different story. With a much higher initial investment cost, irrigation systems can pose a challenge to small farmers looking to increase their yields, especially in areas where rainfall can be limited or inconsistent (Nguyen, Huu Phong). This issue of investment is reduced with the help of Farmer's Unions and extension services. These programs help to provide irrigation system supplies as well as installation and maintenance instructions to farmers struggling to meet initial investment costs, thus playing a remarkably strong role in increasing yields and in turn standards of living (Nhung).

After the growing season, the farmer and additional hired help pluck the tea which is then sorted for sale or processed on site depending on the facilities that the farmer has available. From here tea then moves to the processing nodes

of the supply chain, but it is important to further look at the role of the farmer.

The individual tea farmer in Vietnam has the option to sell to anyone, usually at a local market, and receive all of the profits from their sale (Nguyen, Huu Phong).

In many traditional tea-producing regions where families have a long history or production, these sales frequently occur without any sort of formal contract for purchasing (Nhung). With this, farmers receive all of the profits from their harvests but are also burdened with input and investment costs. That is unless they receive help from local and national authorities, which is available through extension services. The farmer maintains total autonomy if they desire over their production and processing, but many have to meet safety or hygiene standards to sell to some buyers.

2.3.1.2 Tea Plantations

Though individual farmers produce the majority of tea in Vietnam, tea production also occurs on plantations owned by larger firms. In this case, the company hires agricultural workers to attend to a plot of land for directed production. The contractual agreement can vary by company, and in some cases the individual farmers have more autonomy than others over production methods. With this arrangement, depreciation costs in production are dealt with by the company as well as input costs, such as fertilizer and

pesticides. The company then harvests all of the tea, and the agricultural workers receive a wage for their work (Nguyen, Huu Phong).

This form of production is more along the lines of vertical integration, and in some tea circles is a desired direction for the future of tea (Nguyen, Thi Anh Hong). This helps companies to guarantee that various standards in production are met, and in some cases can help lead to higher quality final products. The companies also have more potential to invest in science and technology, which helps plantations to in some cases yield more per hectare than individual famers.

2.3.1.3 Divided Production

In recent years a division between tea producers has begun to develop within Vietnamese tea. Traditionally, Vietnam has produced a relatively low quality of tea for export that is commonly used for blending with other teas rather than being sold on its own, with relatively high amounts of potentially harmful pesticides and fertilizers applied. There has been, and still is a strong demand for this type of tea, especially throughout the Middle East where there is a massive market for cheap black tea, without concern for quality as long as it meets taste preferences. This is beginning to change, however, as Western nations are taking more interest in Vietnamese tea. These importers, like the US and European countries, have very strict safety and hygiene standards for

any products that are to be sold within their borders, and with tea this means limited use of chemicals in production (Dufrene 83). Thus, if a farmer or producer is interested in producing tea for export to the West, their production practices have to change. For some this means replanting their fields with new pest-resistant, low-fertilizer varieties, for others it means using fewer chemicals on their traditional plants. Many producers view this as a burden on their production, and have little desire to change their practices or using old tea varieties with high amounts of chemicals, while others have seen this as potential for increased profits (Nguyen, Thi Anh Hong).

This split has become increasingly evident throughout Vietnamese tea production, as portions of producers have moved to meet new standards for export, while others cling tightly to traditional practices. Members of the tea community view this split with very different opinions. Some like Ms. Nguyen Thu Anh Hong, a member of the Vietnamese Tea Association, see the production of low quality, 'unsafe' tea as necessary to the industry. She sees that this type of production meets a niche demand, with few other countries producing tea in this fashion giving Vietnam a comparative advantage in exporting (Nguyen, Thi Anh Hong). Others believe that the general direction of tea is towards more high quality varieties, but more on this later (Nguyen, Huu Phong).

2.3.1.4 The Problem of Investment

Considerable work is being done throughout Vietnam to increase technology and yield levels in tea production, but the implementation of these practices is lagging. Many see this problem to be a result of a mind-set of producers that is likely a result of decades of war and income insecurity. Tea technology and new varieties take relatively high investment to implement, and many farmers are simply not willing to put forth the money, even if they can afford it. As is an issue with liquid assets throughout Vietnam, farmers think in a very shortsighted manner with their profits and rarely invest in technology due to a residual fear of food insecurity. In an interesting demonstration of this mindset, it has occurred with tea producers that when given free fertilizer by extension services to help boost yields, farmers will simply sell the fertilizer at market to have cash in hand, and then sit on the money in fear of food or income insecurity (Nguyen, Thi Anh Hong).

Many experts see this as a large issue within Vietnamese tea production. Technology exists to increase yields nationwide, but since individual farmers who are hesitant to invest much of their incomes in improvements drive production, production levels remain far below their potential (Nguyen, Thi Anh Hong). This problem is also very closely related to the aforementioned division in production, as many producers are hesitant to put the money forth to meet

international standards in the interest of sitting on their profits for a sense of security. It is important to note as well that many tea farmers are not at income levels that would necessarily justify hoarding their money; tea production is traditionally very stable annually.

2.3.2 Processing

Processing of Vietnamese tea occurs in a variety of forms. In some cases individual farmers will dry and process tea at their own facilities then sell their dried product at market. In other cases, processors will buy wet tea at market and process it in their own facilities, to maintain more control over the final product. In the cases of plantations, tea is grown and then processed all within the company's facilities. Though formerly it was rare for a company to process tea without growing it, there are now many factories that exist only processing (Nguyen, Huu Phong).

Tea processing consists primarily of drying, rolling, and in some cases fermenting the leaves to create various varieties of tea. Traditionally tea was dried by hand on metal plates over a slow-burning fire, but in recent decades dryer technology has spread throughout Vietnam and increased both the mechanization and efficiency of tea processing (Nhung). Mechanization is also occurring with the increased use of rolling machines, but this occurs only in

larger facilities, as these machines require too much investment for farmers to afford. The main inputs that go into this portion of the supply chain occur in the form of energy, whether it is firewood or electricity to power the machines. These costs are either borne by the individual farmer or the company running the processing facility.

2.3.3 Distribution

At current output levels, Vietnam maintains a strong position amongst the top-five tea producing nations in the world. Large international and domestic markets provide great opportunities for growth and help Vietnamese tea distribution to reach far across the globe. Currently, Vietnamese tea penetrates markets in one hundred and ten nations and territories in addition to high levels of domestic consumption. This reach helps to demonstrate the importance of distributors and the distribution process in Vietnamese tea. Tea in Vietnam is currently distributed primarily by national companies, joint-venture companies, and companies that are run totally by foreign capital (Nguyen, Huu Phong).

Though currently there are far more Vietnamese owned corporations involved with tea distribution, most notably state run VINATEA, foreign capital is playing an increasing role in distribution. Over the past two decades there

have been an increasing number of joint-stock ventures setup in Vietnam for tea distribution. These enterprises are run in cooperation between Vietnamese investors and foreign investors, and mainly focus on exporting to the investing foreign nation. In recent years there has also been an increase in enterprises that are funded completely by foreign capital, focusing primarily on production flow back to the investing country. Great examples of this are the Phu Benh Limited Corporation from India or the Finlay Tea Limited Corporation from England (Nguyen, Huu Phong).

Companies are responsible for packaging and shipping the tea to buyers. As aforementioned, much of Vietnamese tea is sold for blending purposes, commonly to be mixed with higher quality teas from other areas. This creates an issue for many Vietnamese tea enterprises as they lack the ability to add value through branding, which could greatly increase revenue. Instead, value is added to the product once it leaves the Vietnamese enterprise and goes to a larger corporation, Lipton for example, where they are able to mix the tea and add additional value by giving the product the Lipton name (Nguyen, Huu Phong).

As Vietnam continues to gain an increased global presence in global tea markets, there has been an influx of foreign capital focused on tea distribution for foreign markets. Though this trend is growing rapidly, Vietnamese tea

distributors handle the majority of tea distribution for both international and domestic markets (Nguyen, Thi Anh Hong).

2.3.3.1 The Role of Multi-National Corporations

Multi-national corporations are playing and increasingly strong and contested role in Vietnamese tea as foreign investors are taking more interest in Vietnamese tea production. Multi-nationals mainly exist in tea production as sources of funding for plantations and companies that primarily produce for export (Nguyen, Huu Phong). They have little direct contact with producers, as producers frequently sell to merchants who then resell tea to the corporations, but multi-nationals have a strong effect in dictating what tea is produced as long as their demand is large enough (Nguyen, Thi Anh Hong). These large corporations have been very influential in the increasing amount of arable tea land that is being devoted to growing Oolong tea, a variety that is native to Taiwan, in place of traditional Vietnamese species of tea. Amongst tea traditionalists, this is a hot point of contention with development. Many people view this as international interests taking over traditional Vietnamese production, and they do not like to see the disappearance of native cropland in the interest of exports (Hoang). This yet again demonstrates the dichotomy that exists between tradition and development in Vietnamese tea. As industry grows,

traditional products are being lost, much the way traditional tea culture is being lost with modernization. What the future holds for these crops has yet to be seen, but right now it does not look good as demand for non-Vietnamese tea varieties is increasing globally (Peiris 70).

2.3.4 Science and Technology

As Vietnam continues its drive onward into twenty-first century tea production, it is increasingly forced to compete with top producers, many of which are achieving comparatively higher yields per hectare and more efficient processing. For Vietnam to compete there has been a drive to develop more tea technologies within the country that can help increase rates of production. Innovation in tea production occurs in two primary areas. The first area is the development of new tea varieties that have higher yields and require fewer chemicals throughout the production process, and the other is new harvesting and processing technology.

Currently there are a variety of institutes throughout Vietnam working on developing new tea varieties to implement into production. NOMAFSI, a research institute in Phu Tho province, is at the forefront of tea development, with dozens of new and hybrid strains of tea being grown in experimental settings with the hopes of spreading them throughout Vietnam's tea land. The

creation and use of new tea varieties is vital to Vietnam's overall tea development, as 49 percent of the country's tea plants are old, lower yield varieties (Nguyen, Huu Phong). This fact is a very large obstacle for development, as these plants do not yield at the levels of new varieties and require the use of much more fertilizer and pesticides. With this, Vietnamese tea production is far below its potential peak output and farmers of old varieties are burdened with the high input costs of chemicals. Research institutes like NOMAFSI are focusing considerable time and energy in producing new varieties through hybridization of traditional plants as well as purchasing clones of higher yield varieties from other countries such as China and Sri Lanka. Currently, NOMAFSI works with sixty varieties of experimental tea, with four of them created in Vietnam (Nguyen, Huu Phong).

On the other side of tea technology is processing equipment. This equipment comes into play throughout the processing phase of production, increasing the efficiency of drying and rolling tea. Currently there are a variety of different machines and processes used to meet the same ends of drying or rolling tea. Individual farmers are generally very limited in the technology that they have access to and are frequently forced to handle these processes manually, unless they have comparatively higher profits. Mechanization increases greatly when enterprises come into play in production, as they have

more capacity for investment in technology and also typically process far higher quantities of tea. Innovation in this area usually occurs outside of Vietnam, with Vietnamese enterprises importing the processing equipment that they use in their facilities. This equipment often comes from China, Japan or other major tea producers. Drying technology can greatly increase the capacity for production for individual farmers, driving down significantly the number of hours that they are required to tend to the tea. This in turn allows them to spend more time on caring for their tea crops or on other income generating activities (Nhung).

Technology has great potential to increase Vietnam's total tea output, and make production far more efficient. The question then arises of how Vietnam can increase the availability of tea technology and investment as a developing country with far more pressing concerns.

2.3.4.1 The Problem of Investment, Again

As is a theme throughout the development of Vietnamese tea, tea science and technology is largely held back by a lack of funds for investment. Research and innovation requires money and time, something that the Vietnamese government, a traditional source for this in a structured economy, lacks for tea. The fact that the majority of tea production is done by individual farmers is an incredible burden to the implementation of new

technologies, as they almost always lack money for or interest in investment. This then shifts the focus for investment to the government and extension services, which also lack sufficient funding for investment on any sort of scale large enough to have a real impact on production. For many in the tea community the only option left appears to be enterprises. Many of which are driven by foreign capital and exports, tea enterprises in Vietnam often operate on a grand enough scale to fund the use of efficient technologies and high yield varieties. The problem remains, however, of the individual farmer. A possible solution to this in the eyes of many experts is increased vertical integration in the form of tea plantations. With this, enterprises have the opportunity to control their tea production and invest directly in their crops, as opposed to purchasing tea from merchants. This helps to increase adherence to international standards, increase uniformity of production, and increase overall yield if proper technologies are applied. The issue that arises from this, though, is the unknown future of the individual farmer. More vertical integration in the interest of investment would drastically change the traditional nature of Vietnamese tea production, but this may be what is needed for Vietnam to truly compete on a global scale.

2.4 The Future of Tea

The future is bright for Vietnamese tea. Its presence is becoming increasingly well known on an international level, and production levels are continuing to grow. The tea community will undoubtedly encounter a variety of opportunities and challenges to development in the coming years, but if properly managed, there is incredible potential for growth.

2.4.1 Globalization

Globalization and an increased presence in world markets will likely bring a variety of opportunities and challenges for Vietnamese tea production. Vietnam's recent ascension into the World Trade Organization will bring great opportunities for Vietnamese tea in the form of extended market supports and new non-traditional trading partners. The following are several key elements of globalization that will play an integral role in the development of Vietnamese tea.

2.4.1.1 The World Trade Organization

In 2007 Vietnam officially became a member of the World Trade Organization (WTO), which is beginning to open a variety of doors for development in both tea as well agriculture in a broader sense. This membership

will help bring Vietnam a variety of potential trading partners from within the organization as well as encourage sustainable good agricultural practices or GAP (Pham 4). Though there is great potential for growth, Vietnam will have to work diligently to align its policies and practices with what is required for WTO membership. This will mean increased market orientation in production, including proper tariff management, as well as a reduction in the use of chemicals in production. The latter has potential to be a major roadblock for the tea industry as nearly half of tea plants are old varieties that require massive amounts of chemical care in order to yield at sufficient levels (Nguyen, Huu Phong). Recent progress was made with regards to food safety though with the recent passage of the Law for Food Safety in July 2010, which limits the use of chemical fertilizer and pesticides on consumer goods (Nguyen, Thi Anh Hong). If Vietnam does not continue to follow the recommendations of the WTO properly they risk sanctions that could be potentially harmful to the tea industry.

Though there will be challenges, the WTO will likely be a great asset to tea development in Vietnam. A very clear benefit of this can be seen in the trademark of the Vietnamese CHEVIET tea label in the Madrid agreements, which is now available in over seventy foreign markets (Nguyen, Huu Phong).

2.4.2 International and Domestic Market Potential

With Vietnam's ascension into the WTO and an increased international presence, global markets will continue to play a growing role in Vietnamese tea production. Globally, tea consumption is increasing rapidly as global standards of living are on the rise and more people have the disposable income to purchase tea as a luxury beverage (Peiris 72). Especially in many Western nations, tea, particularly green varieties, has been publicized in recent years for its tremendous potential health benefits. This gives Western markets, particularly in the United States and areas of Western Europe, outside of the UK, which is already saturated, growing market potential. For Vietnam to access this though, producers will have to meet increasingly rigid health and safety standards, again a challenge to development (Duan 69).

The Middle East will also likely remain a strong international market for Vietnamese tea into the coming decades as countries continue to seek international sources for black tea (Peiris 72). Additionally, China is en route to becoming a tea-importing nation as it struggles with increasing population pressures. With demand primarily for green tea, China will likely have considerable market potential in the coming decades (Nguyen, Thi Anh Hong).

Domestically, the tea market is growing significantly as standards of living are rising. If managed properly, there is great market potential with increasing demand for tea, particularly green varieties as more people can afford

it (Nguyen, Huu Phong). Vietnam has recently experienced a resurgence of traditional values, such as ancestor worship, as incomes have increased. This trend may also hold potential for growth of domestic tea consumption and culture if the markets are properly managed (Nguyen, Thi Anh Hong).

2.4.3 Oolong and New Tea Varieties

In recent years there has been a great influx of new, non-native tea varieties in Vietnam. Most noted has been the increase of oolong tea, a variety native to Taiwan. Though domestic consumption of oolong tea is low but increasing in Vietnam, it is proving to be a great foreign export as land in the tea's native countries is running out (Nguyen, Huu Phong). This trend has led to a slow and gradual decrease in the presence of traditional tea varieties in several tea growing provinces in Vietnam, particularly in the Central Highlands (*"The Vietnam..."* 19).

This trend has been a hotly contested point of debate among members of the tea community. Many see new varieties as incredible opportunities for growth as the teas are in high demand on the global market and much of what is being planted is new, higher-yielding tea than what had previously been grown on the land (Nguyen, Thi Anh Hong). Tea traditionalists, however, see this as a

potential shortsighted direction for development, bringing profits now, but in the future damaging true Vietnamese tea by taking it out of production (Hoang).

This trend of new tea will be an important facet of future development. It is likely that market forces will direct tea towards newer varieties, like oolong, that have more international demand, but at this point it is hard to predict just how much of native Vietnamese varieties will be lost in the process.

2.4.4 Challenges

The development of tea in Vietnam has a lot of potential for great growth, but this growth will come with a variety of critical challenges. Proper management of development will be critical by the Vietnamese government and organizations like the Vietnam Tea Association if the challenges are to be effectively spearheaded.

One of the first and most important challenges to development will be investment. As discussed thoroughly in previous sections, Vietnam will continue to struggle with a source of investment for increased technology and tea varieties that will be critical for competition. With government funding limited, it is likely that enterprises will play an increasing role in investment, and thus an increasing role in decided the direction of development of the Vietnamese tea industry.

Another challenge that Vietnam will struggle with, tied closely to the issue of investment, is the replacement of old tea plants. With current rates of old tea plants that are still in use hovering around fifty percent of total production, change needs to be made if real growth is to be realized. The old plants have traditionally low yields and require high levels of chemical application. New varieties are able to provide higher yields and innate pest resistance in some strains. It is important to note that new varieties in this sense does not necessarily refer to none native species. Institutes like NOMAFSI are working to clone and hybrid native teas into higher yielding strains, and then disseminate the plants throughout Vietnam. The challenge comes in actually converting crops to new species, which is labor and investment intensive.

The future will also bring challenges for the tea industry with the changing role of the farmer in tea production. Enterprises are increasing vertical integration, and as this occurs the role of the individual farmer will continue to shrink. Farmers struggle to come up with funds for investment in their crops, which enterprises are more capable and willing to provide, thus if tea in Vietnam is to truly develop and become more competitive in the international market, it is likely that the individual farmer will meet challenges in the future as they compete more and more frequently with plantations.

Increasing input prices and climate change will also be a challenge that tea producers in Vietnam will have to deal with on a growing scale in the coming decades. Climate change and increasing global temperatures has the potential to change tea-growing areas dramatically and reduce yields, as previously ideal conditions no longer can produce at the same level (Peiris 70). Additionally oil prices will also likely lead to an increase in input prices such as fertilizer, which has increased dramatically in the past several years (Nguyen, Huu Phong). This will put growing pressure on farmers as well as enterprises as they look for the highest returns possible in their domestic and international sales.

From a cultural standpoint the future of tea is hard to predict. Preserving traditional culture will likely be a challenge in the face of modernization and increasingly Western lifestyles in the city. If Vietnam wants to maintain tea as a facet of its traditional culture, it will likely have to make a conscious effort in stopping the dissolution of traditional tea culture.

A final and very significant challenge that Vietnam will be forced to deal with in the coming years as Vietnamese tea gains more presence in international markets is its traditional reputation for producing low-quality teas for blending. Vietnam is capable of producing high quality, competitive teas, but in the past several decades much of the tea that was exported was of low quality with little value added in country. If Vietnam wants to compete on a global scale, there will

need to be a massive rebranding effort in the way of Vietnamese tea to shift previously held perceptions of low quality production.

3.) Policy Recommendation and Conclusion

Tea has an incredible role in Vietnam as both a source of traditional culture and a possible source for great development in the future. It has provided a social outlet for centuries, and could bring considerable investment into Vietnam if growth is managed properly.

From a policy standpoint the government will have to take a cautious path in balancing history and tradition with growth and modernization. The government of Vietnam has shown increased interest in preserving traditional tea and boosting the presence of Vietnamese tea internationally with the recent International Festival of Tea in Thai Nguyen which saw over one hundred billion Vietnamese Dong in investment from the government (Nguyen, Huu Phong). It is important that this event is not forgotten, and the government maintains its interest in tea, as there is true potential for growth. Policies should be directed to increase investment from foreign corporations, as this is overwhelmingly the most viable option for the investment that so desperately needs to take place in tea production. With new, high-yield varieties and more efficient technology, tea production in Vietnam will truly be able to compete on the global market. This

means in turn that individual farmers will have less of a role in tea production, and will likely be absorbed to some extent by enterprises. Though their livelihoods will be changed, it will be an important step that the tea industry will need to take to see the significant improvements in quality and yield that are necessary. The government will also need to continue to follow the recommendations of the WTO with regards to agricultural development. The WTO will bring great opportunity for Vietnam to increase its global tea presence and see real development in the industry as export revenue increases. WTO regulations will also help to encourage Vietnam to produce more safe tea that meets international standards for consumption, making Vietnamese tea more marketable in Western markets, which hold considerable potential for growth (Pham 4). In the future of Vietnamese tea development it will be important that the country lessens its dependency on foreign countries and competitors for tea technology. At its current stage though, any technological innovation can be seen as beneficial, but if Vietnam hopes to truly compete on a global level it will eventually have to stop importing technology from its major competitors. With regards to preserving culture, the Vietnamese government needs to take note as to the significance that tea has played for centuries. Vietnamese culture has a strong communal and social component that has been facilitated by tea drinking for centuries, necessitating preservation. To do this, the government of Vietnam

should consider appropriating more funds to organizations such as the Vietnamese Tea Association specifically for cultural preservation. Funds could be used for tea events or even ideally the establishment of a museum, at the recommendation of Mr. Hoang Anh Suong, to preserve tea culture and appreciation in Vietnam in the face of modernization. Proper allocation of resources for tea preservation has been seen extensively throughout China and Japan, where efforts have been made to preserve ancient forests and tea growing areas while fostering traditional culture, all successfully in the face of modernization. The Vietnamese government needs to follow suit, as it becomes an increasingly important tea producer globally in order to preserve tradition while fostering development.

With deep roots and a bright future, tea in Vietnam has incredible potential. Proper management of development and effective preservation techniques has potential to thrust Vietnam to the forefront of global tea production with a tea culture uniquely its own.

3.1 A Reflection

The findings of this study paint a clear picture of the current state of Vietnamese tea, as well as its past and future potential for growth, following its intended purpose. Further research would be highly beneficial in the areas of investment and its potential sources, as well as avenues for cultural preservation, as these will likely be some of the greatest challenges in the future of tea in Vietnam. Tea cannot be ignored as a potential source of great development in Vietnamese agriculture, and with its increasing global presence this is unlikely to be a problem. The future holds great potential for Vietnamese tea and it has been a pleasure researching such a dynamic crop.

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